

WBCF - Manual - Administrators

Administrators

Versions

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1 Introduction

In this document we will look at the Climbing Frame website and the functions available to administrators.

2 About the Climbing Frame

2.1 What is the Climbing Frame

The union learning Climbing Frame is a free website that can help ULRs create and record a learning development plan for both themselves and their learners.

2.2 What can you do with the Climbing Frame?

As a system administrator of the Climbing Frame you can:

- Use the Climbing Frame as a self-managed learner (*see self-managed learner user manual*)
- Use the Climbing Frame as a ULR (*see ULR user manual*)
- Create and edit the learning themes that appear in the Climbing Frame (*see Learning Theme editor user manual*)
- Review / accept / decline user registrations
- View / create / amend / delete users
- Assign / un-assign learners to ULRs
- Assign / un-assign ULRs to learners
- View / create / amend / delete / merge unions and employers
- View / create / amend / delete editable content areas
- View / create / amend / delete Qualifications drop down
- Import and export data bulk data
- View list of all the hyperlinks within the Climbing Frame and check for any broken links
- View / amend / delete the contextual help
- Print statistical reports

3 User Levels

3.1 Overview

Each user within the Climbing frame is assigned a user level and role; the specific combination controls what a user can do when they are logged into the Climbing Frame, e.g. creating learners, editing page content, etc.

3.2 User Levels

There are five user levels:

- Unionlearn
- Union
- Employer/Sector
- Standard
- Guest

Users are assigned a single level and all user data is stored in a user database.

In many cases Unionlearn, Union, Employer/Sector and Standard users have a hierarchical relationship.

3.3 Table of Roles

Combines with user levels to create the access permissions granted to a user.

Role		Description
1	Admin	Assigned Roles 2-5 by default. Access to additional functions: <ul style="list-style-type: none">• Manage Users• Manage Registrations• Manage Learners• Organisation Settings
2	Approve Registrations	Will be emailed requests to approve self-registrations which have been set to manual approval. Automatically has Role 3 Registration Notification.
3	Registration Notification	Will be emailed notification of approval or denial of self-registration (whether automatic or manual).
4	Learning Theme Editor	Can edit Learning Themes articles via WYSIWYG Editor.

		Learning Theme Editors are assigned access to articles with specific tags only.
5	Statistical Report Viewer	Can view Statistical Reports of aggregated Learner data for All, Union, Employer or Learner Administrator, depending on user level.
6	Learner Administrator	Can access Learner Management and create Learner data. Automatically has Role 5 Statistical Report Viewer.
7	Learner	Can access Learner Management and create Learner data, depending on Admin settings.

3.4 Super Users

A combination of Unionlearn level user and Admin role is referred to as Super User i.e. Unionlearn + Admin = Super User.

A Super User has access to all [administrative](#) functions governing all users, including the following additional functionality:

- Manage Learning Themes
- Manage Content
- Manage Data
- Link Checker

4 Accessing the Climbing Frame

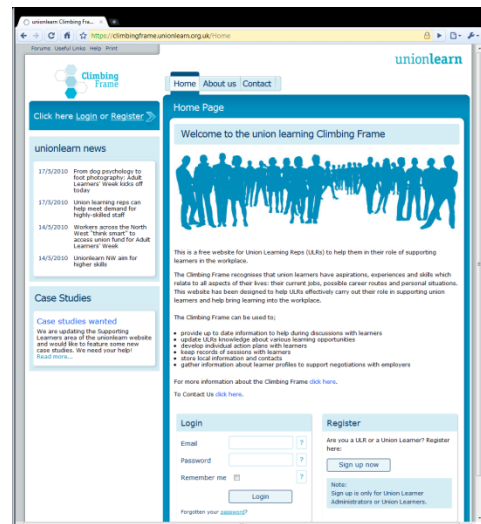
4.1 Registering on the Climbing Frame

You will need to be granted administrator privileges by an existing Climbing Frame system administrator; this may happen at the same time as the system administrator creating you a new Climbing Frame user account or, if you already have an existing Climbing Frame user account, then this will be updated.

4.2 How to access the Climbing Frame

Once your application has been approved you can log into the Climbing Frame using the steps outlined below.

Step 1) To **login** to the website go to:
www.climbingframe.unionlearn.org.uk



Step 2) Enter your **email address**


A screenshot of the login form. The form has a blue header with the word 'Login'. Below the header, there are three input fields: 'Email', 'Password', and 'Remember me'. The 'Email' field is highlighted with a red box. To the right of each input field is a question mark icon. Below the input fields is a 'Login' button. At the bottom, there is a link that says 'Forgotten your password?'.

Step 3) Enter your **password**

A screenshot of the login form. The form has a blue header with the word 'Login'. Below the header, there are three input fields: 'Email', 'Password', and 'Remember me'. The 'Password' field is highlighted with a red box. To the right of each input field is a question mark icon. Below the input fields is a 'Login' button. At the bottom, there is a link that says 'Forgotten your password?'.

Step 4) Click on the **login** button

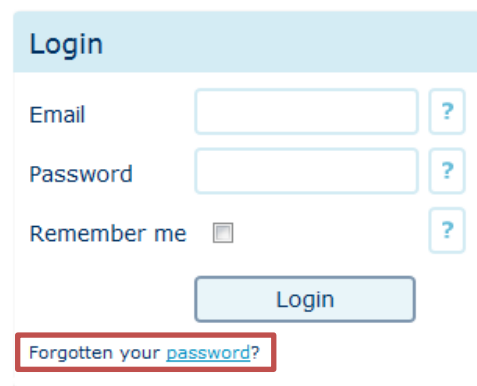
A screenshot of the login form. The form has a blue header with the word 'Login'. Below the header, there are three input fields: 'Email', 'Password', and 'Remember me'. Below the input fields is a 'Login' button, which is highlighted with a red box. At the bottom, there is a link that says 'Forgotten your password?'.

Tip: if you do not understand what you need to enter in any of the data entry fields within the climbing frame simply click on the  next to each field and it will open up the **contextual help** which will give you a fuller explanation of what data is expected for each field as well as links off to additional information in certain cases.

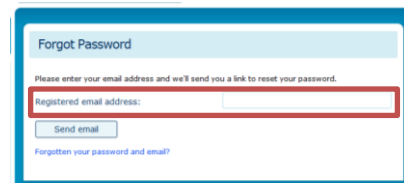
4.3 Forgotten Password?

If you have forgotten your password, don't worry! By following the steps below you can have another password sent to your email address.

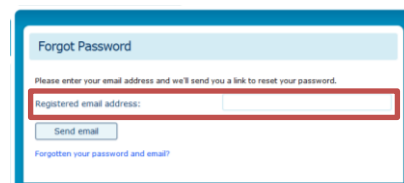
Step 1) Click on the **'Forgotten your password?'** link underneath the login box area.



Step 2) Enter your **'Registered email address'**.
This is the email address that you used when you first registered to use the Climbing Frame.



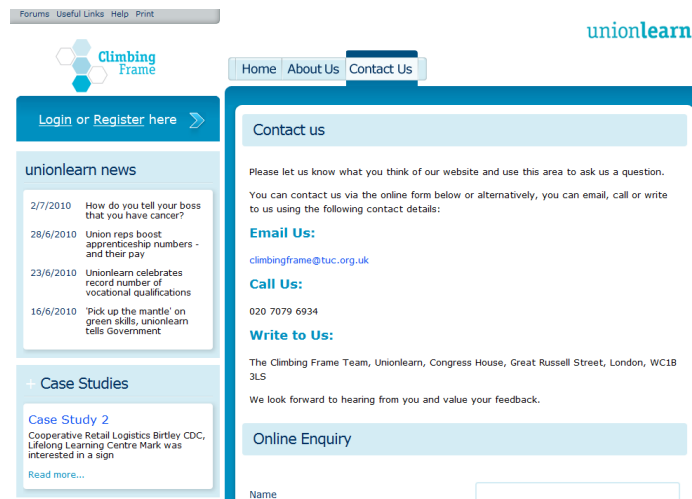
Step 3) Click the **'Send email'** button.



A new password will be sent to your email inbox and you will then be able to use this to access the Climbing Frame. Once in the Climbing Frame you can then change your password to [something more memorable](#).

4.4 Forgotten your Password and Email?

If you have forgotten both your password and email please contact the unionlearn Climbing Frame team. Email: climbingframe@tuc.org.uk or complete the Contact Form.



5 Your Home Page

5.1 About your Home Page

When you log into the Climbing Frame you will see a home page and like most websites this will contain a mixture of navigation links (buttons that take you around the site) and text or images with information on the site.

5.2 What does the Home Page look like?

The screenshot shows the 'Climbing Frame' website home page. The page has a blue header with the 'unionlearn' logo and a navigation bar with links: Home, Learning Themes, Learner Management, ULR Reports, and Admin. Below the header, there's a welcome message for Emma, a search bar, and a list of 'Learning Themes' (Published and Unpublished). The main content area features a 'Welcome to the Climbing Frame Website' section with an introduction text, a photo of a woman, and a 'Free materials for ULRs' button. At the bottom, there's a 'Pending Registrations' section showing 'None at this time' and a link to 'See all registrations requiring approval'.

Forums – links to a discussion forum
Useful links – a list of web resources
My notes – create and maintain your own notes page
Help – a page of frequently asked questions
Print – print the current page

Search – enter a keyword and click **Go** to search for a specific term within the Learning Themes
Learning Themes – click on a Learning Theme to view it

Main Navigation Links – click on these to view:
Learning Themes – information about the Learning Themes
Learner Management – view, add & you're your information & Climbing Frame actions & goals
ULR Reports – view & print all reports
Admin – see all administration functions

Introduction text – this will change from time to time, giving you the have latest updates and information

Bottom of the page
 View the **about us, Climbing Frame courses, Climbing Frame News and Contact us** pages. Visit the **unionlearn learning and careers advice service** website.

Pending Registrations
 None at this time
 See all registrations requiring approval

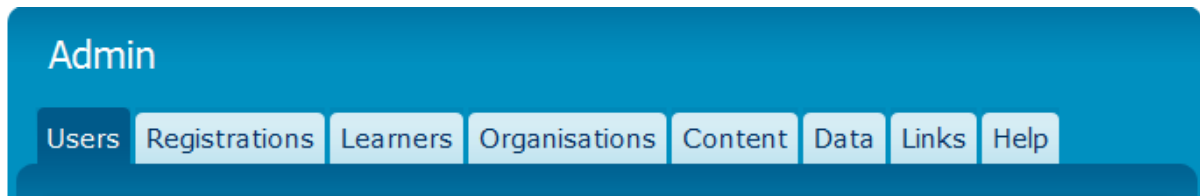
Bottom of the page
 View the **terms & conditions, privacy policy, accessibility information & acknowledgement** pages

6 Administration Tab

6.1 Overview



When you click on the Admin tab you will see the 8 options that are available to you.



A brief outline of each of the options has been provided below:

Admin Sub Tab Name	Functionality
Users	View / create / amend / delete users
Registrations	Review / accept / decline user registrations
Learners	Assign / un-assign learners/ULRS to ULRs/learners
Organisations	View / create / amend / delete / merge unions and employers
Content	View / create / amend / delete editable content areas View / create / amend / delete Qualifications drop down
Data	Import and export data bulk data
Links	View list of all the hyperlinks within the Climbing Frame and check for any broken links
Help	View / amend / delete the contextual help

6.2 Users

6.2.1 Overview

In the **Users** area you can:

- search for users
- view a limited view of a user's profile
- amend a user's permissions
- amend user data, e.g. union, name, telephone number etc.
- create a user

6.2.2 Finding a user

You can find a user by typing into the filter box (shown below) any part of their name, email, level, role, or union. As soon as you starting typing into any one of the filter box areas you will see that the user list starts to filter the list of users.

Name ▾	Email	Level	Role	Union
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6.2.3 Viewing a user's details

Simply click your mouse anywhere on the user's row of information.

Manage Users				
Name ▾	Email	Level	Role	Union
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Paul Barrass	paul.barrass@dreamm	UnionLearn	Admin, Learner, Learn	USDAW
Emma Pincott	emma.pincott@dreamm	UnionLearn	Admin, Learner, Learn	USDAW

This will now open up the user's profile page.

Users

Registrations

Learners

Organisations

Content

Data

Links

Help

Editing user 'Emma Pincott'

First name

Emma

Last name

Pincott

Union

USDAW

Employer / Sector

Please choose...

User Level

UnionLearn

Optional information:

Email address

emma.pincott@dreamm.co.uk

Initials

Telephone

07766950311

Set password

Confirm password

Roles

☒ Admin

☒ Approve Registrations

☒ Notify Registrations

☒ Theme Editor

☒ Reports

☒ Learner Administrator

☒ Learner

Save

Cancel

Delete User

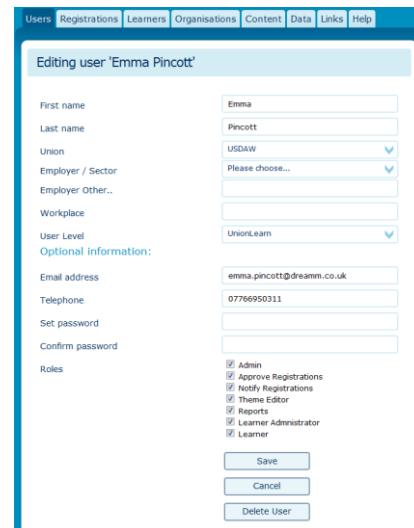
6.2.4 User's Profile Page

The user's profile page consists of the following information, all of which can be amended and edited by the administrator.

Form Area	Format
First Name	Free text box
Last Name	Free text box
Union	Drop down selection
Employer / Sector	Drop down selection
Employer Other	Free text box
Workplace	Free text box
User Level	Drop down selection
Email address	Free text box
Telephone	Free text box
Set password	Free text box
Confirm password	Free text box
Roles	Check box selection

6.2.5 Amending a User's Profile Information

Step 1) Open a user's profile page (see step [6.4 Users – Viewing a user's details](#))

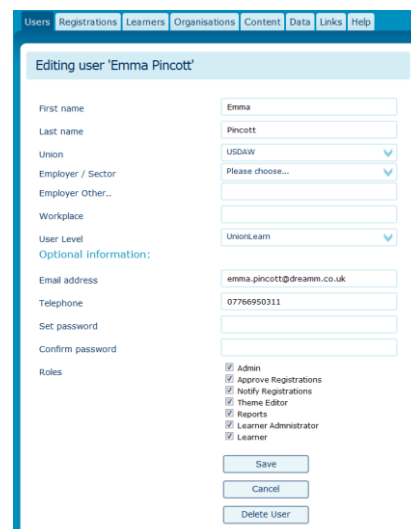


Step 2) Change the required area, e.g. name

Step 3) Click the '**Save**' button

6.2.6 Deleting a User

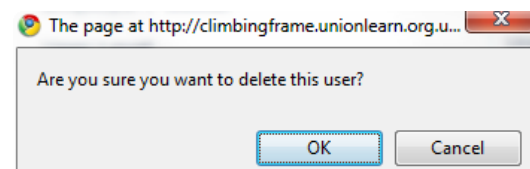
Step 1) Open a user's profile page (see step [6.4 Users – Viewing a user's details](#))



Step 2) Click the '**Delete User**' button

Delete User

Step 3) Click the **OK** button to confirm that you wish to delete the user and therefore remove their access to the Climbing Frame



6.2.7 Creating a User

Step 1) Click on the **'Create User'** button

Step 2) Complete the User Profile data

The screenshot shows the 'Create User' form within a web application. At the top, there is a navigation bar with tabs: Users, Registrations, Learners, Organisations, Content, Data, Links, and Help. Below the navigation bar, the 'Create user' form is displayed. It contains the following fields: First name, Last name, Union (a dropdown menu with 'Please choose...' selected), Employer / Sector (a dropdown menu with 'Please choose...' selected), User Level (a dropdown menu with 'Please choose...' selected), and an 'Optional information' section with fields for Email address, Initials, Telephone, Set password, and Confirm password. At the bottom of the form are 'Save' and 'Cancel' buttons. Above the form, there is a 'Create User' button, and below it, a 'Save' button.

Step 3) Click the **Save** button

6.3 Registrations

6.3.1 Overview

In the **Registrations** area you can approve or deny and pending user registrations that have been received by users completing the online web based climbing frame registration form (either as a ULR or self-managed learner):

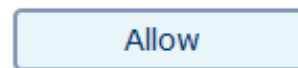
<http://climbingframe.unionlearn.org.uk/account/register>

The screenshot shows the 'Registrations awaiting your approval' page within a web application. At the top, there is a navigation bar with tabs: Users, Registrations, Learners, Organisations, Content, Data, Links, and Help. Below the navigation bar, the page title 'Registrations awaiting your approval:' is displayed. The page lists two registrations, each with a name, email address, type, and details about their union, employer, and workplace. Each registration has 'Allow' and 'Deny' buttons.

Name	Email	Type	Union	Employer	Workplace	Actions
Emma Pincott	emma@pincott.com	Learner	Accord	No employer at this time	None at this time	<button>Allow</button> <button>Deny</button>
Paul Barrass	paul@barrass.co.uk	ULR	ATL	No employer at this time	none	<button>Allow</button> <button>Deny</button>

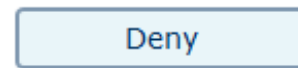
6.3.2 Approving a Registration

Step 1) Click on the 'Allow' button



6.3.3 Declining a Registration

Step 1) Click on the 'Deny' button



6.4 Learners

6.4.1 Overview

In the **Learners** area you can view and amend whom each person is assigned to, e.g. ULRs assigned to learners and vice versa.

6.4.2 Assigning a ULR to a Learner

Step 1) Select a ULR from the filter list

Select a ULR or Learner:

Name	Email	Level	Role
Paul Barrass	paul.barrass@dreamm.co.uk	UnionLearn	Admin, Learner, LearnerAc
Emma Pincott	emma.pincott@dreamm.co.uk	UnionLearn	Admin, Learner, LearnerAc

Step 2) You can then see all the learners both assigned and unassigned to that particular ULR

Assigned Learners/ULRs

Unassign Selected

Name	Email	Level	Role
Test_2 Smith		Standard	Learner
Johnny Sainsc		Union	Learner

Unassigned Learners/ULRs

Assign Selected

Name	Email	Level	Role
Emma Pincott	emma.pincott@dreamm.co.uk	UnionLearn	Admin, Learner, LearnerAc
Martin Bam	Bjpartners@dreamm.co.uk	UnionLearn	Admin, Learner, LearnerAc

Step 3) Select a learner from the Unassigned column

Assigned Learners/ULRs

Unassign Selected

Name	Email	Level	Role
Test_2 Smith		Standard	Learner
Johnny Sainsc		Union	Learner

Unassigned Learners/ULRs

Assign Selected

Name	Email	Level	Role
Emma Pincott	emma.pincott@dreamm.co.uk	UnionLearn	Admin, Learner, LearnerAc
Martin Bam	Bjpartners@dreamm.co.uk	UnionLearn	Admin, Learner, LearnerAc

Step 4) Click on the **Assign Selected** button

Assign Selected

- Step 5) The learner will now appear in the Assigned column

Assigned Learners/ULRs

Unassign Selected

Name	Email	Level	Role
emma			
Emma Pinne		Standard	Learner
Emma Pinc	emma.pinc	UnionLearr	Admin, Lear

6.4.3 Removing a Learner from a ULR

- Step 1) Select a ULR from the filter list

Select a ULR or Learner:

Name	Email	Level	Role
Paul Barrass	paul.barrass@dreamm.co.uk	UnionLearn	Admin, Learner, LearnerAc
Emma Pincott	emma.pincott@dreamm.co.uk	UnionLearn	Admin, Learner, LearnerAc

- Step 2) You can then see all the learners both assigned and unassigned to that particular ULR

Assigned Learners/ULRs

Unassign Selected

Name	Email	Level	Role
Test_2 Smith		Standard	Learner
Johnny Sainsc		Union	Learner

Unassigned Learners/ULRs

Assign Selected

Name	Email	Level	Role
Emma Pinc	emma.pinc	UnionLearr	Admin, L
Martin Bam	Bjpartners	UnionLearr	Admin, L

- Step 3) Select a learner from the Assigned column

Assigned Learners/ULRs

Unassign Selected

Name	Email	Level	Role
emma			
Emma Pinne		Standard	Learner
Emma Pinc	emma.pinc	UnionLearr	Admin, Lear

- Step 4) Click on the 'Unassign Selected' button

Unassign Selected

- Step 5) The learner will now appear in the Unassigned column

Unassigned Learners/ULRs

Assign Selected

Name	Email	Level	Role
Emma Pinc	emma.pinc	UnionLearr	Admin, L
Martin Bam	Bjpartners	UnionLearr	Admin, L

6.5 Organisations

6.5.1 Overview

In the **Organisations** area you can view / create / amend / delete / merge unions and employers.

There are 2 distinct sub tabs in the **Organisations** area:



6.5.2 What You Can Change for Each Union

You can edit the following areas for each Union:

Name	<input type="text" value="Accord"/>
Logo	<input type="button" value="Choose File"/> No file chosen
Learner Login?	<input type="button" value="NO"/>
ULR Self Registration?	<input checked="" type="button" value="YES"/>
Learner Self Registration?	<input type="button" value="NO"/>

Form Area	Format	What does this do?
Name	Free text box	You can type in the name of the union, controls how the union name appears in the Climbing Frame
Logo	File upload button	Upload a logo of the union, this then appears in the reports for any Climbing Frame user belonging to that specific union
Learner Login	Toggle button	Allows ULRs to let learner's log into their own Climbing Frame
ULR Self Registration	Toggle button	Allows ULRs to register for the Climbing Frame via the online form
Learner Self Registration	Toggle button	Allows Learners to register for the Climbing Frame via the online form

6.5.3 Editing a Union

Step 1) Click on **Edit**

Accord	Edit	Delete
ACM	Edit	Delete
Advance	Edit	Delete

- Step 2) Amend the details as necessary
- Name
Logo
Learner Login?
ULR Self Registration?
Learner Self Registration?

No file chosen
- Step 3) Click on the **Save** button
-

6.5.4 Uploading a Union Logo

- Step 1) Click on **Edit**
- | | | |
|---------|----------------------|------------------------|
| Accord | Edit | Delete |
| ACM | Edit | Delete |
| Advance | Edit | Delete |
- Step 2) Click on **Choose File**
- Name
Logo
Learner Login?
ULR Self Registration?
Learner Self Registration?

No file chosen
- Step 3) Locate the file on your PC and double click
- Step 4) Click **Save**
-

6.5.5 Deleting a Union

- Step 1) Click on **Delete**
- | | | |
|---------|----------------------|------------------------|
| Accord | Edit | Delete |
| ACM | Edit | Delete |
| Advance | Edit | Delete |
- Step 2) Click **OK** to delete the union
-

6.5.6 Merging Unions

Step 1) Click on **Edit**

Accord	Edit	Delete
ACM	Edit	Delete
Advance	Edit	Delete

Step 2) From the drop down list select an organisation to merge with

Edit Union 'Accord'

Name

Logo No file chosen

Learner Login? ☐ NO ☒ YES

ULR Self Registration? ☐ YES ☒ NO

Learner Self Registration? ☐ YES ☒ NO

Organisation Transfer Wizard

Merge this organisation with:

- Please choose...
- ACM
- Advance
- Aegis
- AEP
- AFA

NB: you will not receive a warning message to confirm that you want to merge the unions so please ensure that you are absolutely sure that you wish to merge a union before you use this option – there is NO undo option.

6.5.7 Creating a new Union

Step 1) Click on **Create new Union** link

Manage Organisations Unions Employers

Create new Union..

Name		
ACM	Edit	Delete
Advance	Edit	Delete

Step 2) Type in the name of the new union

Enter name for new union:

Step 3) Click on the **Create** button

Step 4) Upload a logo and select whether to allow learners to login and/or ULRs / Learners to self-register

Name

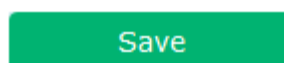
Logo No file chosen

Learner Login? ☐ NO ☒ YES

ULR Self Registration? ☐ YES ☒ NO

Learner Self Registration? ☐ YES ☒ NO

Step 5) Click the **Save** button



6.5.8 Editing an Employer

Step 1) Click on the **Employers** tab



Step 2) Click on **Edit**

No employer at this time	Edit	Delete
Other (type below)	Edit	Delete
Valuation Office Agency	Edit	Delete

Step 3) Amend the details as necessary

Name	Other (type below)
Logo	<input type="button" value="Choose File"/> No file chosen

Step 3) Click on the **Save** button



6.5.9 Uploading an Employer Logo

Step 1) Click on **Edit**

No employer at this time	Edit	Delete
Other (type below)	Edit	Delete
Valuation Office Agency	Edit	Delete

Step 2) Click on **Choose File**

Name	Other (type below)
Logo	<input type="button" value="Choose File"/> No file chosen

Step 3) Locate the file on your PC and double click

Step 4) Click **Save**

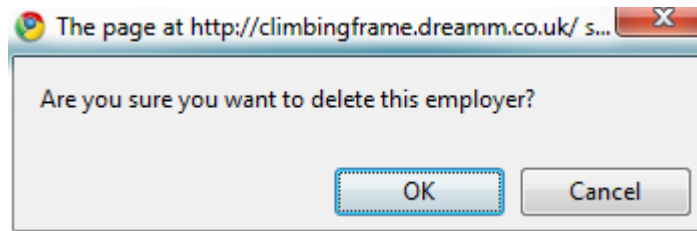


6.5.10 Deleting an Employer

Step 1) Click on **Delete**

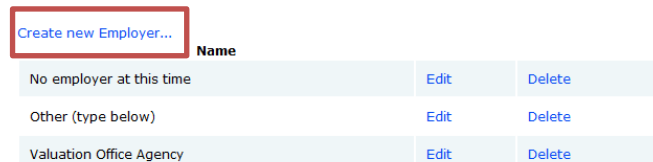
No employer at this time	Edit	Delete
Other (type below)	Edit	Delete
Valuation Office Agency	Edit	Delete

- Step 2) Click **OK** to delete the employer



6.5.11 Creating a new Employer

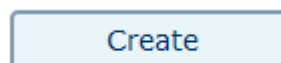
- Step 1) Click on **Create new Employer** link



- Step 2) Type in the name of the new employer

Enter name for new employer:

- Step 3) Click on the **Create** button



- Step 4) Upload a logo

Edit Employer / Sector 'dreamm'

Name

Logo No file chosen

- Step 5) Click the **Save** button



6.5.12 Merging Employers

- Step 1) Click on **Edit**

No employer at this time	Edit	Delete
Other (type below)	Edit	Delete
Valuation Office Agency	Edit	Delete

Step 2) From the drop down list select an organisation to merge with

Edit Employer / Sector 'dreamm'

Name	<input type="text" value="dreamm"/>
Logo	<input type="button" value="Choose File"/> No file chosen
<input type="button" value="Save"/>	
<input type="button" value="Cancel"/>	

Organisation Transfer Wizard

Merge this organisation with:

Please choose...

Please choose...

No employer at this time

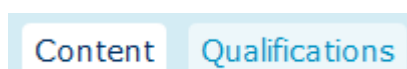
Other (type below)

Valuation Office Agency

NB: you will not receive a warning message to confirm that you want to merge the employers so please ensure that you absolutely sure that wish to merge an employer before you use this option – there is NO undo option.

6.6 Content

6.6.1 Overview



In the **Content** area there are two sub tabs

6.6.1.1 Content

You can view and amend the text and images that appears on editable content pages within the Climbing Frame website. The pages that you can edit are:

- About Us
- Accessibility
- Acknowledgements
- Case Studies Required
- Case Study 1
- Case Study 2
- Climbing Frame News
- Climbing Frame Publications
- Climbing Frame Training
- Contact Us
- Data Protection Agreement
- Help
- Home (logged in)

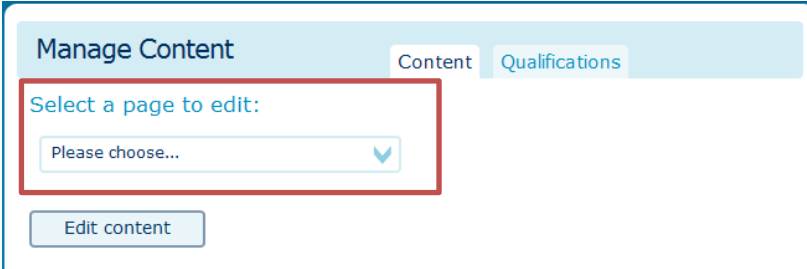
- Home (not logged in)
- Learner
- Privacy Policy
- Terms of Use
- Useful Links

6.6.1.2 Qualifications

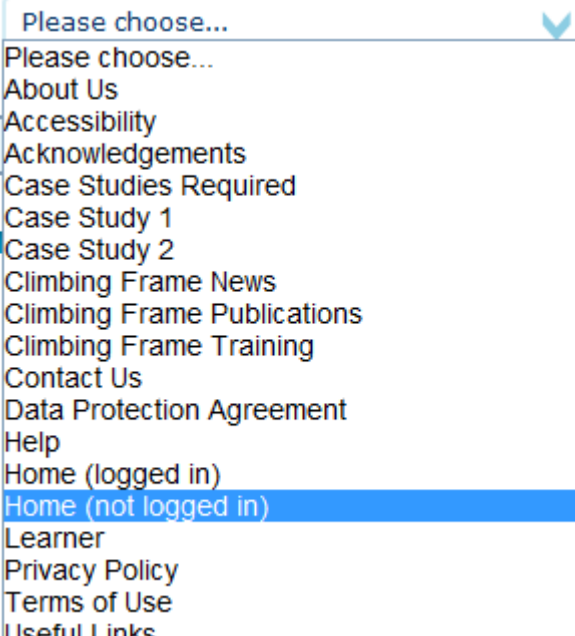
Allows you to change the qualifications levels that appear as drop down selection boxes in the learner details and action details forms.

6.6.2 Editing a Content Page

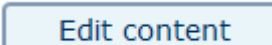
Step 1) Click on **Select a page to edit:** drop down



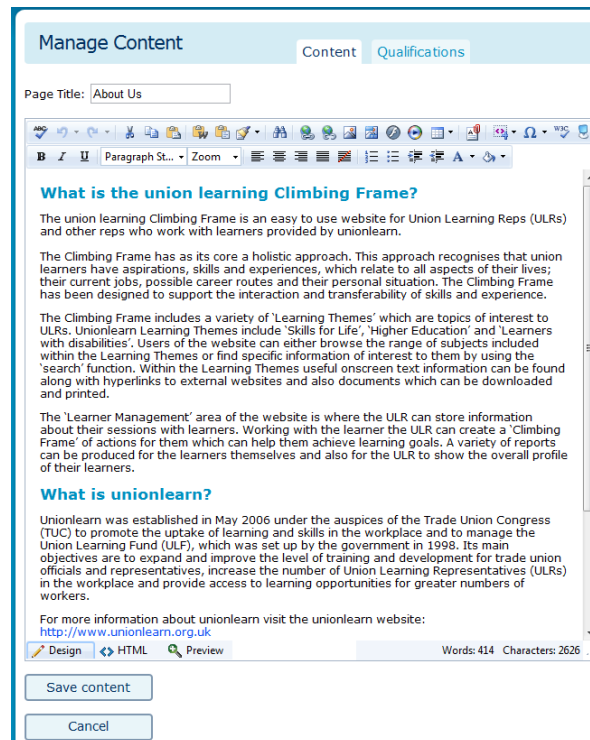
Step 2) Select the page that you would like to edit



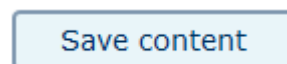
Step3) Click the **Edit Content** button



Step 3) Make the required changes to the page

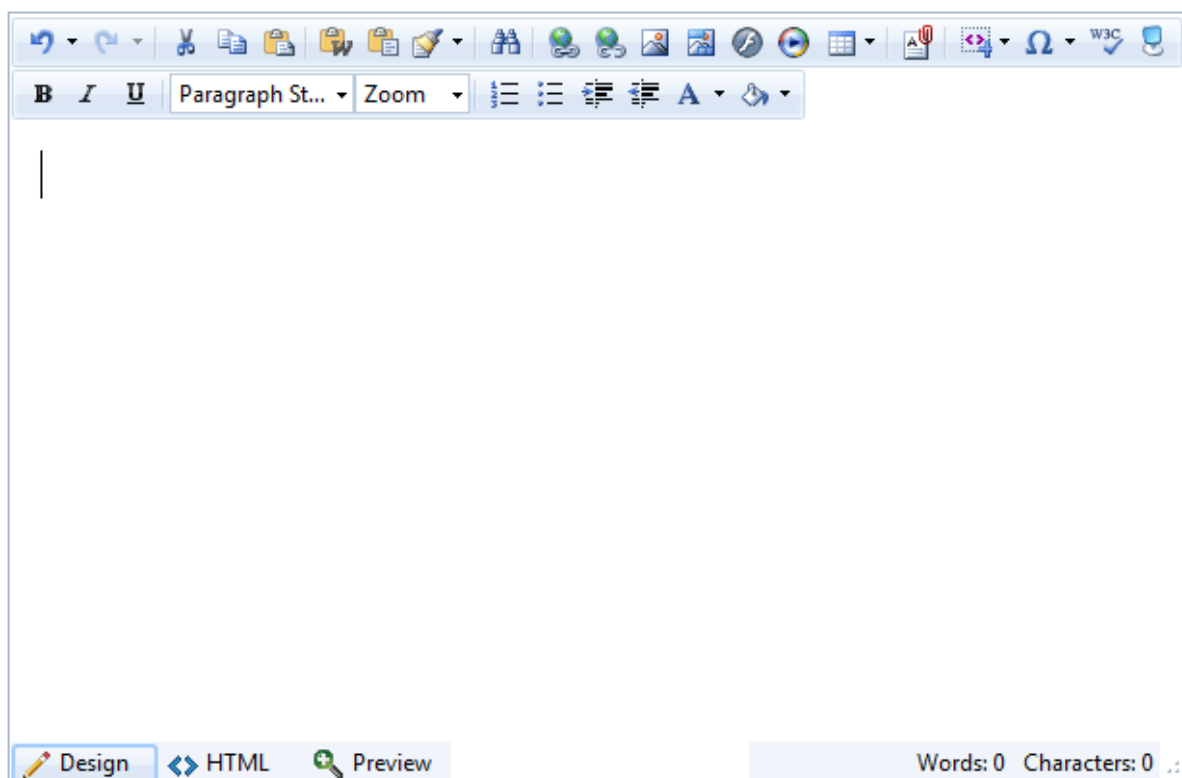


Step 4) Click the **Save Content** button



6.6.2.1 Editing a Content Page - Editing Box

An editing box is a data entry field that allows you to perform a number of formatting and editing functions which will alter what and how the information that you enter is displayed on screen.






























6.6.2.2 Editing a Content Page – Editing Controls



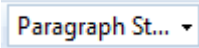
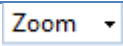





Within the editing box you have access to a number of function buttons, ranging from copying text to creating hyperlinks.



Below is a list of each of the buttons and a description of their functionality.

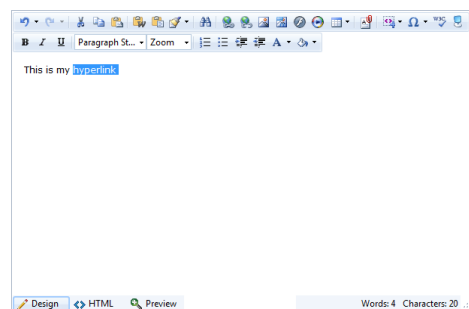
Name	Image	What it does
Undo		Un-does previous action.
Redo		Re-does previous action.
Cut		Cuts selected text or images
Copy		Copies selected text or images
Paste		Pastes copied text or images
Paste from Word		Pastes text from Word. <i>NB: this function not recommended as it keeps Words formatting options which result in the information not displaying as per the rest of the site.</i>

Name	Image	What it does
Paste plain text		Pastes copied text as plain text. NB: this is the RECOMMENDED option when pasting text from Word or any other application into the layout area.
Format stripper	 <div data-bbox="724 479 1131 759">  Strip All Formatting  Strip Css Formatting  Strip Font Elements  Strip Span Elements  Strip Word Formatting </div>	Removes all formatting from selected text. Options available are:
Find and replace		Finds and replaces specified text.
Hyperlink manager		Allows you to add hyperlinks, anchors or email links to selected text.
Remove link		Removes any hyperlinks, anchors or email links from selected text.
Image manager		Allows you to upload an image to the database, and insert an image.
Image map editor		Inserts a hotspot on an image.
Flash manager		Allows you to upload a Flash file to the database, and insert a Flash file.
Media manager		Allows you to upload a Media file to the database, and insert a Media file.
Insert table		Inserts a table.
Document manager		Allows you to upload a document to the database, and insert a link to the document.
Insert code snippet		Allows you format selected text into a pre-defined style.
Insert symbol		Inserts a symbol.
W3c checker		Check content to make sure it is accessible.
Full screen		Creates a full view editing area
Bold		Makes selected text bold.

Name	Image	What it does
Italic		Makes selected text italicised.
Underline		Makes selected text underlined.
Paragraph Style		Styles selected text into h1, h2, h3 formats
Zoom		Zooms in and out of the editing area
Numbered list		Makes selected text into a numbered list.
Bulleted list		Makes selected text into a bulleted list.
Indent		Moves the selected text inwards
Outdent		Moves the selected text outwards
Spell checker		Checks for spelling mistakes.

6.6.2.3 Editing a Content Page – Hyperlink Manger

Step 1) Select the text that you would like to make a hyperlink from



Step 2) Click on the **Hyperlink Manager** icon



Step 3) To create a hyperlink to a **web address**:

URL: Enter the URL

Link text: don't change

Target: change the Target from None to

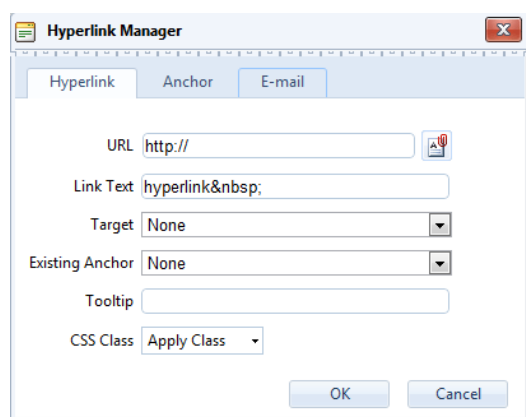
New Window using the drop down (this will ensure that when someone clicks on your link it opens in a new window)

Existing Anchor: don't change

Tooltip: enter a description of the site that you are linking to

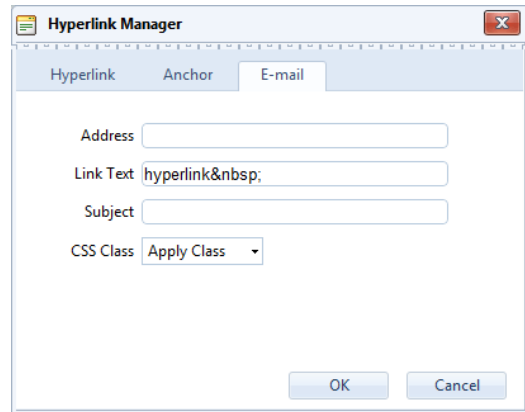
CSS class: don't change

Click OK to save changes or Cancel to discard



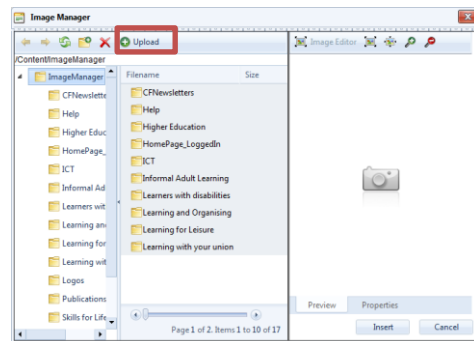
OR

- Step 4) To create a hyperlink to an **email** link
(i.e. opens up a mail application ready to send an email to a specific person)
Address: Enter the recipients email address, e.g. you@thisplace.com
Link text: don't change
Subject: enter the subject for the email (optional)
CSS class: don't change
Click OK to save changes or Cancel to discard

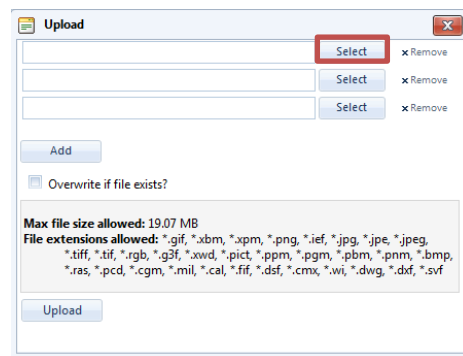


6.6.2.4 Editing a Content Page – Image Manger

- Step 1) Click on the **Image Manager** icon
- Step 2) In the image manager popup click on the **Upload Image** tab



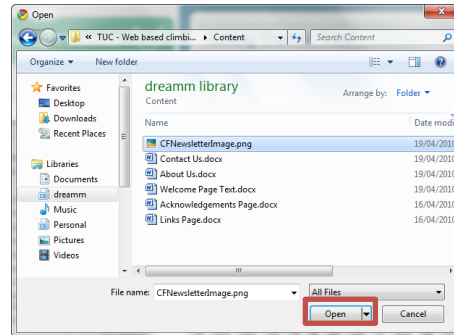
- Step 3) Click on the **Select** button



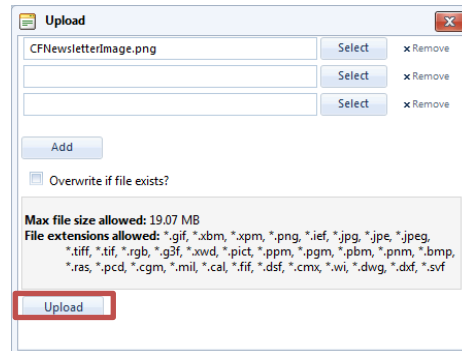
- Step 4) Navigate to and click on the file that you wish to upload

Step 5) Click **Open**

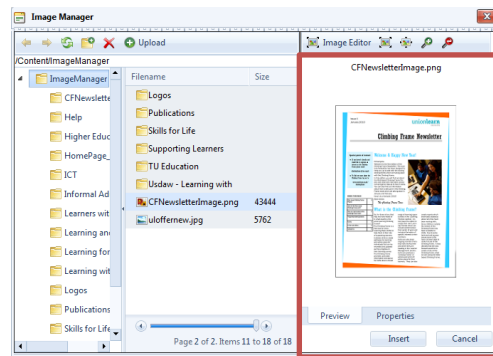
Repeat steps 3 -5 as necessary



Step 6) Click **Upload**



Step 7) You can then see a preview of your image, plus you can also click on the **Insert** button at this point to add it to the content.

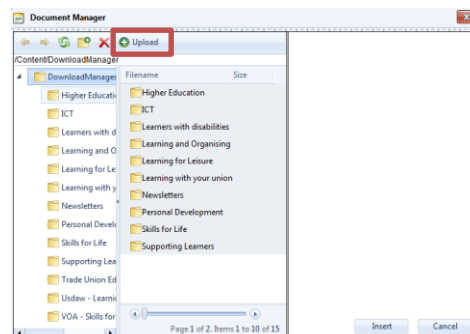


6.6.2.5 Editing a Content Page – Document Manger

Step 1) Click on the **Document Manager** icon



Step 2) In the document manager popup click on the **Upload Image** tab



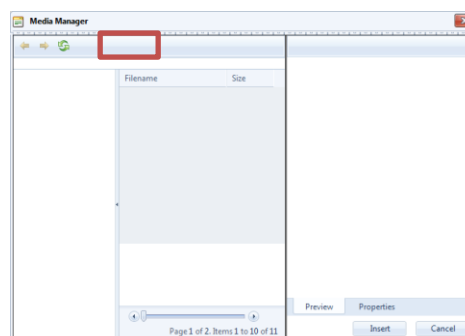
Step 3) Complete steps 3 – 7 as per the Image manager above

6.6.2.6 Editing a Content Page – Media Manger

Step 1) Click on the **Media Manager** icon



Step 2) In the media manager popup click on the **Upload Image** tab

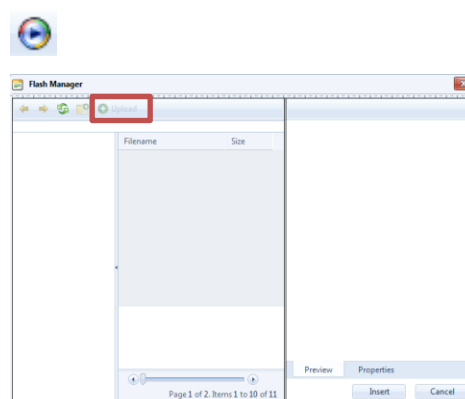


Step 3) Complete steps 3 – 7 as per the Image manager above

6.6.2.7 Editing a Content Page – Flash Manger

Step 1) Click on the **Flash Manager** icon

Step 2) In the flash manager popup click on the **Upload Image** tab



Step 3) Complete steps 3 – 7 as per the Image manager above

6.6.3 Editing an Existing Qualification

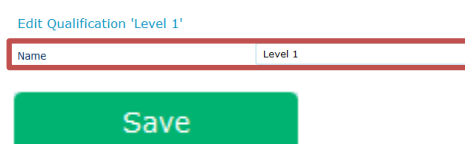
Step 1) Click on the **Qualifications** tab



Step 2) Click on **Edit**



Step 3) Change the name of the qualification



Step 4) Click the **Save** button

6.6.4 Creating a New Qualification

Step 1) Click on the **Qualifications** tab

Step 2) Click on **Create new Qualification...**

Step 3) Enter the name of the qualification

Step 4) Click the **Create** button

Step 5) Click the **Save** button

Step 6) Your new qualification will appear in the list

The screenshot shows the 'Qualifications' tab in the 'Manage Content' section. A red box highlights the 'Qualifications' tab and the 'Create new Qualification...' button. Below, a table lists qualifications from Level 1 to Entry Level, each with an 'Edit' link. A form for creating a new qualification is shown with the name 'New level' entered and the 'Create' button clicked. A subsequent 'Edit Qualification' screen shows the 'New level' name and 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box. Finally, the 'Manage Content' screen is shown again, with a red box highlighting the 'Entry Level' qualification in the list.

6.7 Data

6.7.1 Overview

In the **Data** area you can export and import large amounts of data both to and from the Climbing Frame.

6.7.2 Export

Step 1) Click on the **CSV** button

Export

A red box highlights the 'CSV' button in the 'Export' section.

Step 2) This will download a CSV file of all the data to your computer. **NB: please be**

*aware that this will take a long time
due to the volume of data to be
downloaded.*

6.7.3 Import

Step 1) Click on the **Choose File** button

Import

Select file: No file chosen

Step 2) Locate the spread sheet on your PC and double click. **NB: you will have to have been provided with the correct spread sheet from dreamm prior to starting this process**

Step 3) Click on the **CSV** button

Import

Select file: No file chosen

6.8 Links

6.8.1 Overview


In the **Links** area you can view a list of all of the hyperlinks contained within the Learning Themes on the Climbing Frame website.

Next to each link you'll be able to see the Learning Theme that it is used in and its status, e.g. good (link works) or bad (link is broken).

6.9 Help

6.9.1 Overview

In the **Help** area you can view and amend all of the contextual help that appears in the Climbing Frame website. Contextual help is the text that appears when you click on a

question mark button , these appear next to each form item within the site to give the users guidance on what they are required to do, e.g. type in their name, select their highest qualification level.

6.9.2 Editing Help Text

Step 1) Click on **Edit**

Context Help			
Input Name	Help Title	Help Body	
Action Archived	archiving an action	Archiving an action removes it from view on your Climbing Frame.	Edit
Action Completed	completing an action	Completing an action changes it status colour on the Climbing Frame from yellow to green. A completed action will also be visible in the Achievements tab.	Edit
Action CompletionDate	completion date	Using the calendar select the date on which the Action was completed.	Edit
Action Description	action description	Enter a full description of the Action, e.g. what steps you need to undertake in order to achieve the action.	Edit
Action Details	action details	Enter any results, outcomes or additional information that arose as a result of you undertaking your Action.	Edit

Step 2) You can now change the title of the contextual help box and also the main body of the contextual help text.

Edit help for 'Action.Archived'

Help Title	archiving an action
Help Body	Archiving an action removes it from view on your Climbing Frame.

Step 3) Click on the **Save** button

Save

Edit help for 'Login.Email'

Help Title

login email

Help Body

Type in the email address that you registered to use the site with.

Save

Cancel

Help about login email

Type in the email address that you registered to use the site with.

Close

Appendix A – Data Protection Policy

Unionlearn, which is part of the Trades Union Congress (TUC), has an overarching objective to help unions spread a lifelong learning message to members. The TUC is registered as a data controller under the 1998 Data Protection Act (the Act) - registration no. Z8053646.

Unionlearn recognises its legal obligation to comply with the Act. It processes personal and sensitive personal data in order to achieve its goals and in particular to:

- Strengthen union capacity on learning by training and supporting over 23,000 union learning representatives and by supporting 250,000 learning opportunities each year.
- Provide effective union representation in the workplace by training union representatives and union professionals.
- Monitor and improve the effectiveness of Unionlearn.

Unionlearn collects and uses certain types of information about people with whom it deals. These include union learning representatives, learners, union members, current, past and prospective employees and suppliers, including providers.

Unionlearn fully endorses and adheres to the principles of the Act. It has implemented data protection policies and procedures to help ensure that employees and union learning representatives treat personal information lawfully and correctly. Steps have also been taken to ensure that employees and union learning representatives who manage and handle personal information are appropriately trained to do so and that data handling processes and procedures are regularly reviewed and audited for compliance.

All unionlearn employees and union learning representatives are responsible for complying with the Act. Managers are responsible for supervising their staff and overseeing compliance.

The Act includes eight data protection principles. Unionlearn is committed to complying with these principles and all other aspects of the Act and in particular will seek to ensure that the personal data it holds is:-

(i) processed fairly and lawfully

- we will seek to ensure that individuals whose data we hold know what we intend to do with their personal information
- wherever necessary and appropriate we will seek the individual's consent to our processing of their personal data

(ii) obtained for specified and lawful purposes, and shall not be further processed in any manner incompatible with that purpose or those purposes

- we will use the personal data that we hold for our purposes only and in accordance with the processing purposes as stated in our notification with the Information Commissioner's Office

(iii) adequate, relevant and not excessive in relation to the purposes for which it is held

- we will only store and use individuals' personal data for our reasonable and legitimate activities

(iv) accurate and up to date

- we will always try to ensure the quality of our information
- we welcome and encourage individuals to inform us if they believe any of our information is inaccurate so that we can update our information sources accordingly

(v) not kept for longer than necessary for the purposes for which it is held

- we operate a retention policy to ensure that old or surplus personal data is removed from our records after a reasonable time

(vi) processed in accordance with the rights of the individual concerned

- we will seek to comply with individual requests and notices
- we will provide data subject access to personal information in accordance with the Act
- we will prevent processing in certain circumstances, if requested
- we will correct, rectify, block or erase information which is regarded as wrong information, when notified

(vii) kept securely to avoid accidental loss, destruction or damage to personal data

- we operate appropriate organisational and technical security arrangements in relation to all personal data we hold

(viii) not transferred out of the European Economic Area (EEA) without appropriate safeguards

- we recognise that personal data need to be treated with particular care in countries which do not have reciprocal data protection laws

- we will not transfer personal data outside the EEA without the individual's consent or suitable safeguards

Please contact Stephen Russell at Congress House, WC1B 3LS, srussell@tuc.org.uk if you have any questions or comments in respect of this data protection policy.

Appendix B – Terms of Use

About the terms

Access to and the use of www.climbingframe.unionlearn.org.uk is provided by unionlearn on the following terms:

1. By using www.climbingframe.unionlearn.org.uk

you agree to be bound by these terms, which shall take effect immediately on your first use of www.climbingframe.unionlearn.org.uk. If you do not agree to be bound by all of the following terms please do not access, use and/or contribute to www.climbingframe.unionlearn.org.uk

2. Unionlearn may change these terms from time to time and so you should check these terms regularly. Your continued use of www.climbingframe.unionlearn.org.uk

will be deemed acceptance of the updated or amended terms. If you do not agree to the changes, you should cease to use this website.

Copyright notice

3. Copyright material presented on the UnionLearn site is owned by the TUC, unless otherwise stated. Visitors are permitted to print and download extracts for their own personal or union use, provided the source and TUC's copyright is acknowledged.

4. No one shall, without prior consent of the TUC transmit, reproduce or store any of the material from the UnionLearn site in any other web site or incorporate or reproduce any material in any database whether electronic, manual or printed from. Requests for consent should be submitted to Rob Sanders.

Use of www.climbingframe.unionlearn.org.uk

5. You agree to use www.climbingframe.unionlearn.org.uk only for lawful purposes, and in a way that does not infringe the rights of, restrict or inhibit anyone else's use of enjoyment of www.climbingframe.unionlearn.org.uk.

Intellectual Property

6. Except where indicated otherwise, the material on this website is copyright of unionlearn.

7. Copyright also applies to all resources made available via the website, including (but not limited to), html documents, Word documents, PDF documents and images. Many of these

resources can clearly be identified as being copyright of a third party, and authorisation to reproduce such material must be obtained from the copyright holders concerned.

8. Photographs and personal stories used on this website depict real people. The written permission from unionlearn must be obtained prior to the copying of this material.

Disclaimer

9. Unionlearn has made all reasonable efforts to ensure that all information provided through the Climbing Frame website is accurate, current and informative. However, there may be inadvertent and occasional errors for which we apologise.

10. The material that appears on this website is for general information purposes only. While every care has been taken to ensure the accuracy, currency, reliability and completeness of the contents of this website, no warranty is given as to the accuracy, currency, reliability and completeness of the information provided. Unionlearn accepts no responsibility for loss or damage of any nature that may arise from reliance on information contained in this website or in relation to the services that are described. If you are using the website and notice what you believe to be a factual error, please advise us.

11. All links provided on this site are for the convenience of users. Unionlearn accepts no liability or responsibility for the contents or availability of these sites, nor does the existence of the link mean that unionlearn endorses the material that appears on the linked web site. Unionlearn cannot guarantee that any links will work.

12. Unionlearn does not accept responsibility for the performance of downloading software or the effect of downloading on any third party computer system.

Registration

13. To access and make full use of the Climbing Frame you will be required to register for the website.

14. You may change or update your password or other details at any time via your account. You promise that all information and details provided are true, accurate and up to date in all respects and at all times.

15. It is your sole responsibility to maintain the confidentiality of your password and that you are responsible for all activity that occurs under your username and password. We will not be liable where your password is used by someone else. You should notify us immediately

of any unauthorised use of your password and any breach of security as soon as you become aware of it.

Privacy

16. Unionlearn fully complies with the requirements of the Data Protection Act 1998 with regard to the collection, processing, storage and disclosure of personal information. Please read our Privacy Statement posted on the Climbing Frame website which contains important information about the use of your personal data and other information regarding your privacy.

Links to other website and services

17. www.climbingframe.unionlearn.org.uk contains links to other third party websites. These links are provided for your ease of reference and convenience only. We have no control over those third party websites or services and are not responsible for their contents. We do not endorse the material contained in their websites or services, and have no association with their operators. You agree that we won't be party to any transaction or contract with a third party that you may enter into and we won't be liable to you for any loss or damage which you may suffer by using those third party websites and services. You agree that you will not involve unionlearn in any dispute you may have with such third party websites and services.

General

18. These Terms of Use were last updated on 8th July 2010.

Contact

19. To contact unionlearn about these Terms of Use please write to:

Climbing Frame Team

Unionlearn

Congress House

Great Russell Street

London WC1B 3LS

Or email: climbingframe@tuc.org.uk